



PBS Customer Dashboard User Guide

U.S. General Services Administration
Public Buildings Service

Spring 2019
Version 1.0

Introduction

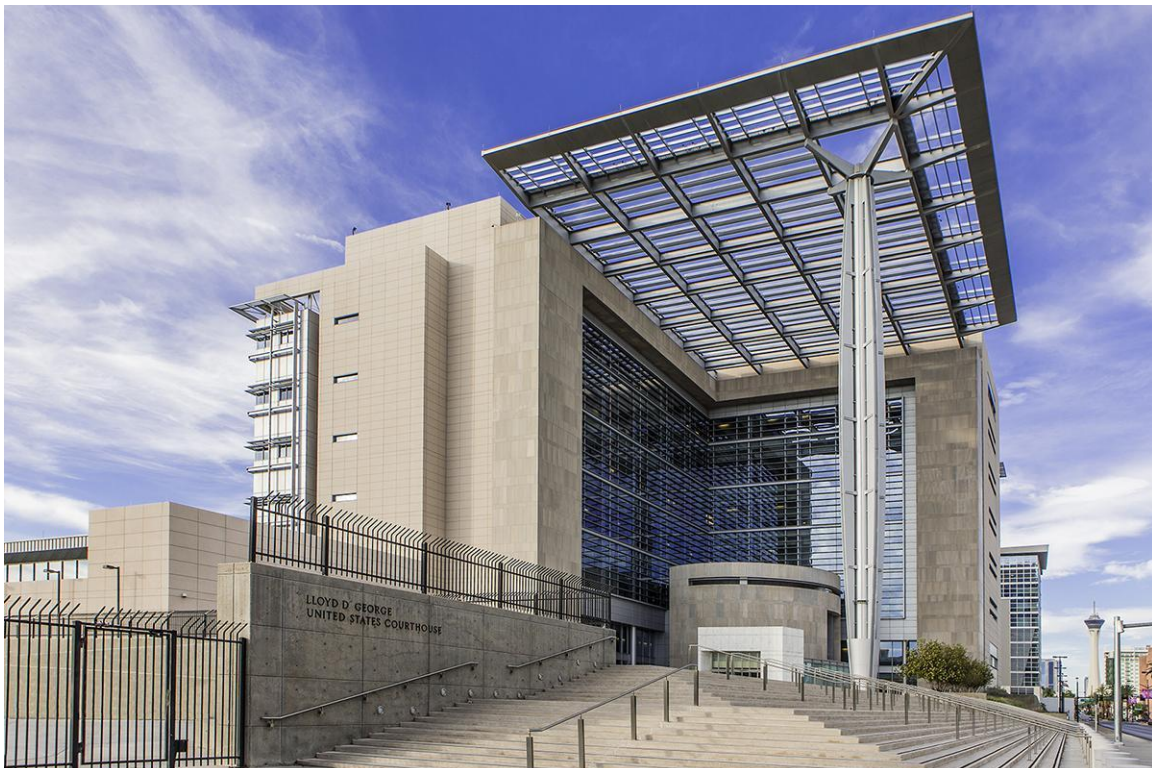
The PBS Customer Dashboard is a web-based interactive database with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

The dashboard provides 24/7 access to a current operational view of an agency's GSA-managed occupancies, Reimbursable Work Authorizations (RWAs), and projects of all types, with the most recent status and financial information available.

PBS customers can use this dashboard to evaluate status and details of individual Occupancy Agreements (OAs), RWAs, and projects (space lease, repair and alteration, new construction, design, and many more). The dashboard is designed for portfolio and transactional viewpoints, with a variety of filtering capabilities (geographical, size, status, and funding levels) for diverse use cases.

The dashboard is housed on GSA's D2D (Data to Decisions) web portal, <https://D2D.gsa.gov>. Instructions for gaining access to and locating the dashboard are on pages 7-8 of this guide.

GSA PBS looks forward to working with our customers as we enhance and build on the first version of the PBS Customer Dashboard. Feedback and suggestions for future versions are welcome through your local or national GSA contacts.



Las Vegas Courthouse

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Scope of Data in the Dashboard

The dashboard has four views:

My Projects	View your agency's current projects with GSA, from new space leases or construction to space consolidation or design projects. Compare project counts by type, funding amount, size, location and current lifecycle phase. Find details of individual projects including team members and POCs, funding obligations and balance, and latest schedule milestones achieved.
My RWAs	View your agency's open Reimbursable Work Authorizations (RWAs), types A, B, F, N and R. Find overall obligation amounts and remaining balances per RWA type, see which RWAs are substantially complete but not financially closed, and review trends in RWA acceptance throughout a fiscal year. View details of individual RWAs including financial and funding information, POCs, primary worksite, and status dates.
My Occupancies	View your agency's current, final Occupancy Agreements with GSA and filter by size, location, bureau, and OA lifecycle status. Identify upcoming occupancy planning activities based on due dates for strategic and technical requirements for expiring OAs. Explore the details of individual OAs to find parking counts, square footage, cancellation or termination information, OA effective and expiration dates, and POCs.
My Rent	View your agency's annual or monthly rent bills by bureau, building, city, state, or by individual OA. Compare your agency's rent bills by month, or by calendar or fiscal year. Examine yearly trends in square footage and rent.

Scope of Data in the Dashboard

My Projects

Update Frequency: **Weekly, Fridays by 9 AM Eastern**

Scope of Data:

All **open projects in GSA-leased and GSA-owned space, all funding and square footage thresholds**. *Closed projects are excluded: 120 days after 'substantial completion' for ePM projects, 65 days after financial closeout for RETA-only RWA projects, or 65 days after status changes to 'closed' in REXUS for lease actions (see page 32 for project type definitions).*

Most **project types**, including new construction and acquisition, major and minor repair and alteration, design project, study, special emphasis project, furniture/fixture/equipment purchase, reimbursable work authorization (types A, B, F and N), lease action (New, Succeeding, Superseding, New/Replacing, Expansion, and Reduction), and space consolidation. *Excludes: Lease Actions other than those listed above and RWA types C, D, E and R.*

Project **funding information**: funding sources (including Amortized Tenant Improvement, Reimbursable Work Authorization, BA55, etc.), funding authorized amounts, obligations and balance.

Project **schedules** including lifecycle phases, milestones within each phase, planned dates and actual dates. Status notes and dates the schedule and status notes were last updated.

Project **static information** including location (state, city, address, building number/name, GSA region), GSA-leased or GSA-owned status, and project tenant bureaus

Project **contacts**, including GSA Project Manager and Sponsor, GSA Contracting Officer, GSA Leasing Specialist and Supervisor, and Customer Agency Contact

Occupancy Agreement information: related OA numbers, OA status, tenants and OA expiration dates

Lease information, where applicable: lease number, existing/prior leases and estimated annual rent

Source Systems:

ePM Project Types

ePM	Project scope, milestones, funding, costs, and team members
FMIS	Obligations against project funding

Lease Action Projects:

REXUS	Lease project scope, status note, and static information
G-REX	Lease project milestones and team members

Reimbursable Work Authorization (RWA/RETA-only) Projects

RETA	RWA project scope, milestones, funding, costs, and team members
------	---

Scope of Data in the Dashboard

My RWAs

Update Frequency: **Weekly, Fridays by 9 AM Eastern**

Scope of Data:

All open Reimbursable Work Authorizations (RWAs) types A, B, F, N and R which are open, not financially closed, including RWAs which are **substantially complete** but not financially closed. *Excludes RWA types C, D, and E.*

RWA Financials: amounts authorized, obligated, billed, percent obligated, and remaining balance; most recent fund type, agency accounting data, treasury account symbol, Billed Office Account Code, and funding authority.

RWA Dates and Timelines: acceptance/start date, substantial completion and letter date, most recent fund year, fund expiration date, and RWA acceptance trends (count and authorized amount) by fiscal quarter

RWA Descriptors such as service type and description, primary work site location, related lease, and points of contact

Source System: RETA

My Occupancies

Update Frequency: **Weekly, Fridays by 9 AM Eastern**

Scope of Data

All FINAL Occupancy Agreements (OA) in GSA-owned and GSA-leased space

OA Details including agency/bureau, location, size, parking, personnel count, effective date, expiration date, underlying lease information including termination rights dates for GSA-leased space, and points of contact

Occupancy Planning Dates based on OA expiration, existing occupancy information, including fiscal year of expiration

Source System: OA Tool, REXUS

My Rent

Update Frequency: **Monthly, First Friday by 9 AM Eastern**

Scope of Data:

Itemized rent bills, month by month through FY18. See summary rent bills by agency or bureau, filter rent bills by State, City, or view bills at the building or Occupancy Agreement level. *Coming in fall 2018: compare rent bill changes month to month or year to year and see historic rent and square footage trends over three fiscal years.*

Source System: OA Bill

How to Find and Access the Dashboard

Customer Access Protocol

Step 1 - Register your .gov/.mil email address with MAX.gov

- If you're already registered with MAX.gov, no action needed (proceed to Step 2)
- If you're not yet registered, visit <https://login.max.gov>

Click the green Register Now button in the top-right

corner. Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login

Don't Have a MAX ID Yet?

Register Now

Step 2 - Log into the D2D Portal using your MAX.gov credentials

- Go to: <https://d2d.gsa.gov/> and click **Login** at the top right
- Option A: **Login with PIV/CAC** (you may need to enter your PIN)
- Option B: Login with **MAX Secure+ SMS Two-Factor** with User ID and Password.



LOGIN WITH YOUR
PIV OR CAC

Remember to plug in
your PIV/CAC card

Note: you have to log into the D2D Portal at least once before moving to step 3 in order for access credentials to work.

Step 3 - Email pbs.dashboard@gsa.gov to request access to your agency's view of the PBS Customer Dashboard. Note: this step is not required if you received a welcome email from PBS Dashboard team - you are already on the access list.

Your email must include:

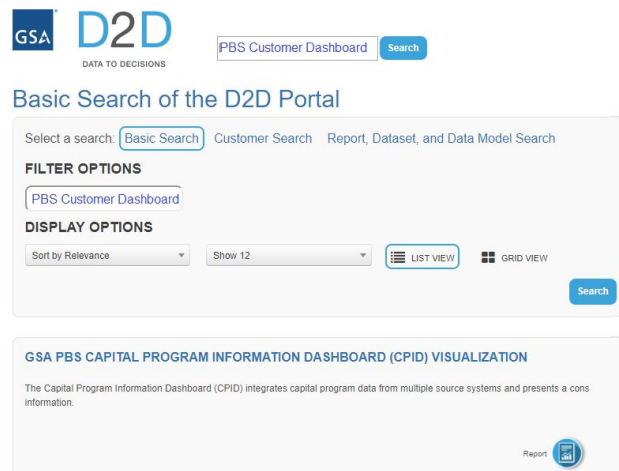
- Full Name
- Your federal agency and bureau name
- Government email address used to create the MAX.gov account in Step 1
- Verify (state) that you have registered your .gov/.mil email address with MAX.gov
- State whether you are a federal government employee or a contractor

The PBS Dashboard Team will verify your access request with your agency. We aim to respond within 5 business days.

Step 4 - Once you've received an access approval email from the PBS Dashboard team, search the D2D Portal for "PBS Customer Dashboard"

If you do not see the dashboard in the results list, wait one business day and log back in; credentials are updated every evening.

Click on the dashboard title or the 'reports' icon to enter the dashboard landing page.



How to Find and Access the Dashboard

Internal GSA Access Protocol

Step 1 - Register your .gov/.mil email address with MAX.gov

- If you're already registered with MAX.gov, no action needed (proceed to Step 2)
- If you're not yet registered, visit <https://login.max.gov>

Click the green Register Now button in the top-right corner.

Follow the instructions to register with MAX.gov and register your PIV card to enable MAX.gov PIV login.

Don't Have a MAX ID Yet?

[Register Now](#)

Step 2 - Log into the D2D Portal using your MAX.gov credentials

- Go to: <https://d2d.gsa.gov/> and click **Login** at the top right
- Option A: **Login with PIV/CAC** (you may need to enter your PIN)
- Option B: Login with **MAX Secure+ SMS Two-Factor** with User ID and Password.



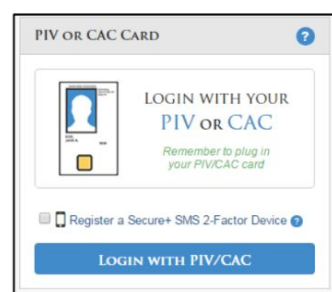
MAX SECURE+ SMS TWO-FACTOR

User ID [Set a Personal Username](#)

Password [Forgot, Set, or Change Your Password?](#)

☒ Use MAX Secure+ SMS 2-Factor (BETA)

[LOGIN WITH USER ID AND SMS](#)



PIV OR CAC CARD

LOGIN WITH YOUR
PIV OR CAC

Remember to plug in
your PIV/CAC card

☐ Register a Secure+ SMS 2-Factor Device

[LOGIN WITH PIV/CAC](#)

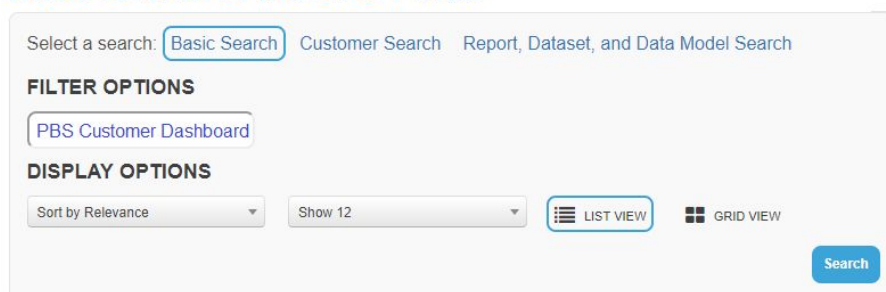
Step 3 - Search the D2D Portal for "PBS Customer Dashboard"

Click on the dashboard title or the Report icon to enter the dashboard landing page.

If you encounter issues with this process, contact pbs.dashboard@gsa.gov.



Basic Search of the D2D Portal



Select a search: [Basic Search](#) [Customer Search](#) [Report, Dataset, and Data Model Search](#)

FILTER OPTIONS

DISPLAY OPTIONS

Sort by Relevance Show 12

[LIST VIEW](#) [GRID VIEW](#)

[Search](#)

PBS CUSTOMER DASHBOARD

The PBS Customer Dashboard is a web-based interactive database with project and occupancy information for federal agencies with space managed by the Public Buildings Service (PBS) of the U.S. General Services Administration (GSA).

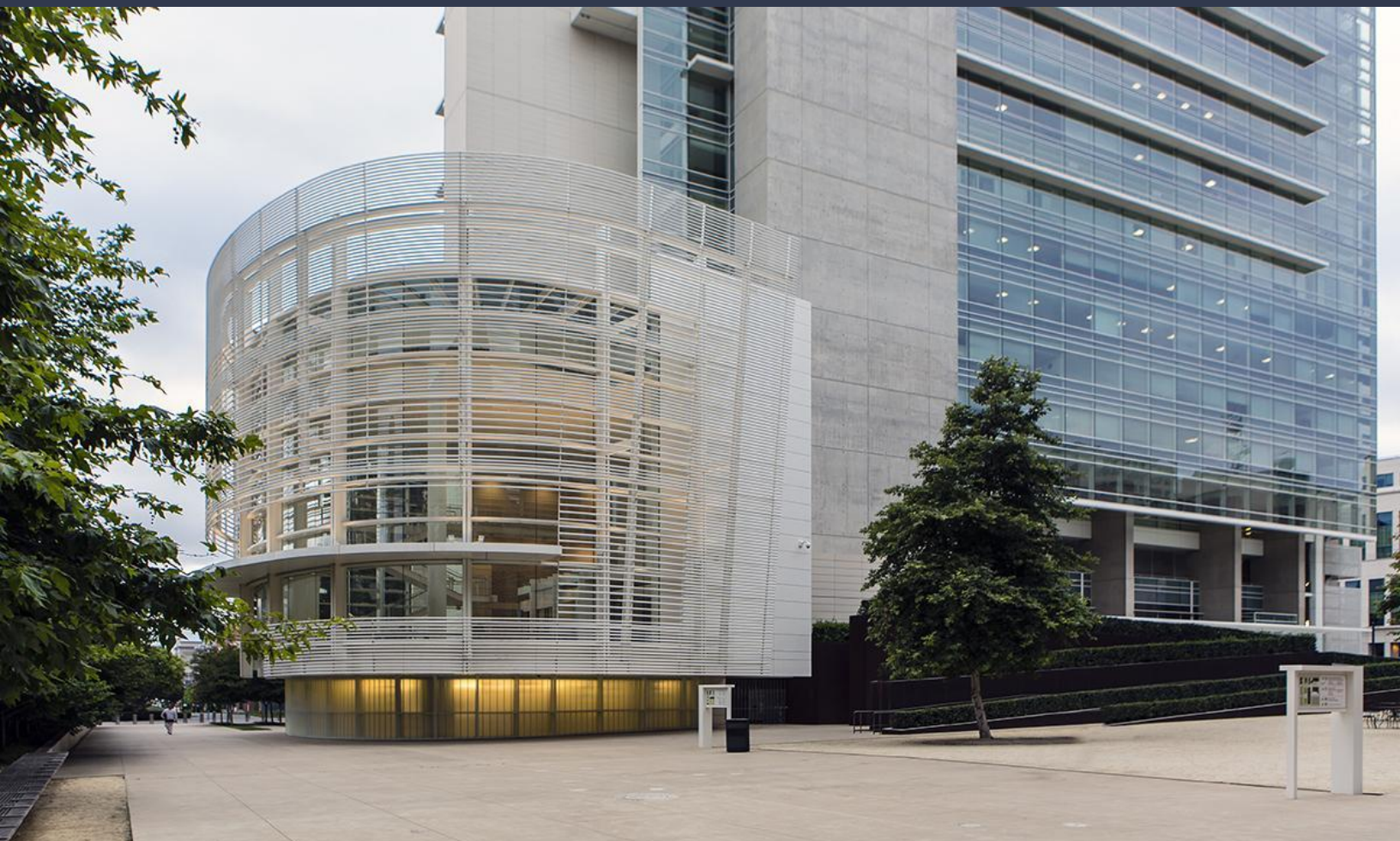
Report



Quick Start Guide

How To Use and Interact with the Dashboard

Pages 9-17



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Section 2: How to Apply Filters

Section 3: How to Interact with Data Tables

Section 4: How to Interact with Maps, Graphs and Diagrams

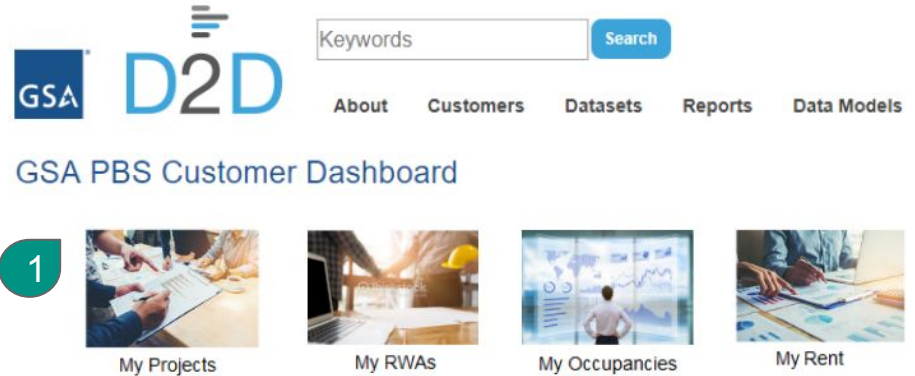
Section 5: Export/Download and Other Footer Buttons

How to Use the Customer Dashboard

General Guidance For All Views

Tip 1: Four Views on the Dashboard Landing Page

There are four Views in the PBS Customer Dashboard: My Projects, My RWAs, My Occupancies and My Rent. Click on a view icon to access that set of data.



Tip 2: Navigate From View to View using the Tabs at the Top of the Page

Note the Welcome and Guidance tab, where you'll find descriptions of dashboard views, relevant resources, and the Dashboard User Guide.



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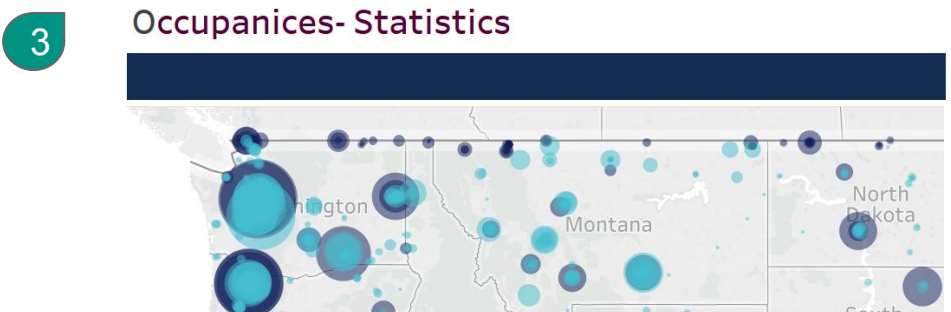
Section 5: Export/Download and Other Footer Buttons

Tip 3: There are 3 Sections in Each View: National Summary, Statistics, and Details

The views represent the dataset selected using the Filters (filters tips are on next page). The information is presented from a high portfolio level and moves towards a detailed level as you scroll down the page.

3

	OA USF	OA RSF	Count of Personnel	% of Space	OA Count
GSA-Leased	160,965,836	179,152,012	401,659	52.54%	10,075
GSA-Owned	120,232,357	161,846,474	319,189	47.46%	10,447
Total All Buildi..	281,198,193	340,998,486	720,848	100.00%	20,522



3

Occupancy Agreement Details					OA Number
					AAK00845
IDENTIFIERS	OA Current Version	OA Effective Date	OA Expiration Date	FY Expir	
	32	10/1/1996	10/1/2026	2027	

Pro Tip: To access details for a specific Project, OA or RWA, refer to the List in the Summary section and use the drop-down selection menu to find the item and see its details. You can also type in the ID in the search box at the top of the drop-down selection menu.

Project Identifier

38711

38711-10000001

Note that if you applied filters to the top of the page, the selection in the Drop-Down menu will be limited to the filters you selected.

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Section 2: How to Apply Filters

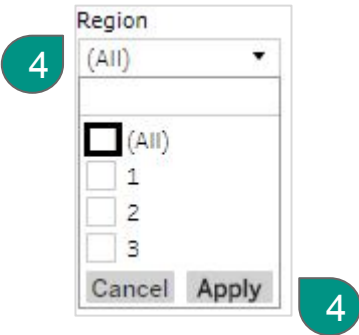
Section 3: How to Interact with Data Tables

Section 4: How to Interact with Maps, Graphs and Diagrams

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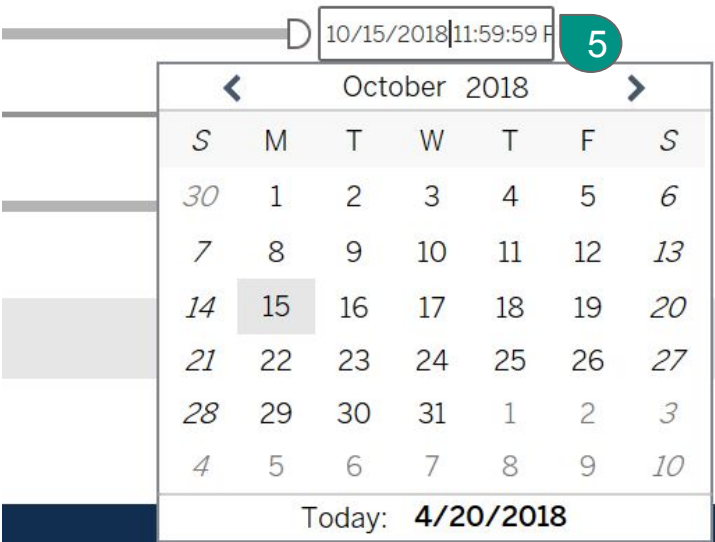
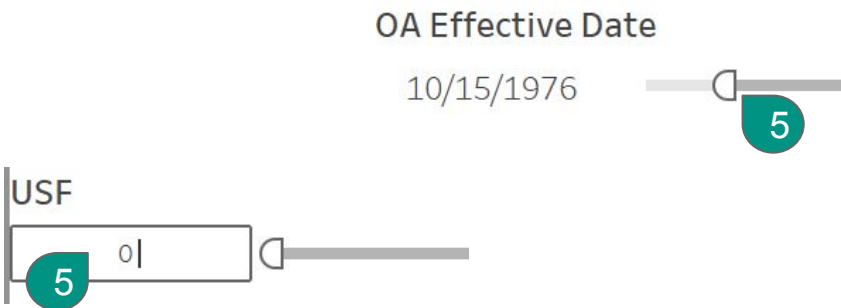
Tip 4: All Filters are Applied by Default. To Apply a filter(s), Start by Deselecting All.

When you open the dashboard, you are looking at all of your data, unfiltered. Deselect filters by clicking the filter (which will say “All”), uncheck the “All” box, select your filters of choice, then click ‘Apply’.



Tip 5: Slider Filters Work Two Ways: Drag and Drop the Slider, or Enter the Date or Number into the Box

You can customize your data by applying date ranges, dollar ranges, and square footage parameters. Use the drag-and-drop slider bars or enter a number into the parameter box, which will give you a calendar option if the parameter is a date



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General Guidance For All Views

Tip 6: Most Filters Contain a Search Box to Type in Desired Filters (Find a City, Bureau or POC Name)

Directly above the check boxes in all multi-select pick-list filters (like this one below), there is an open text search box where you can type the name of the filter you'd like to apply, such as a bureau, a POC, or a city.

6

Bureau

(All)

judiciary

☒ 1000 - JUDICIARY

☒ 1003 - JUDICIARY COURTS DC

☒ 1022 - JUDICIARY RETURN ON INVESTMENT VACANT S

Tip 7: Filters You've Applied are shown in Selected Filters Listed Below the Filters Grouping

To verify other filters you've selected, such as building names or lifecycle phases, you'll need to click on the filter and scroll to see which boxes are checked.

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SELECTED FILTERS: Bureau: All; GSA Region: 1, 3, 4 and 7 more; State: All; City: All

Tip 8: If the D2D site asks you if you want to reset your session, click 'Yes' - your filters will remain

The filters you've applied will not reset; only the time clock on your login will reset. Any filters you applied will remain when you click 'Yes' to reset.

D2D Alert

Your session is about to expire. Do you want to reset it?

Yes No

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Tip 9: If Wording is Cut Off and you see ‘...’, Hover Over the Wording to see the full word or phrase

If you see “...” and a word, phrase, or name is cut off, just hover your mouse over the cut-off wording and the full text will appear in a floater box



Tip 10: Table Data Can Be Sorted Only by the Far Left Column. To Sort Table Data by a Middle Column, Download the Data into Excel Format

Download/Export instructions are on pages 16-17 of this guide.



Tip 11: If You Click a Cell in a Table, It will Highlight. Undo the Highlight by Clicking it Again or Using the Esc Key

% of Space	Non-Cancelable OA	Non-Cancelable OA RSF	Number of Buildings	Number of OAs	R
52.52%	12	855			
47.48%					
100.00%	13	1,204,802	119	154	

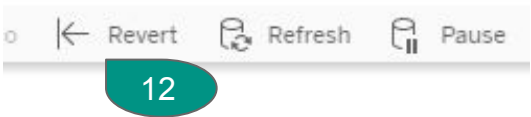
✓ Keep Only ✕ Exclude

Lease Code: GSA-Leased

Non-Cancelable OA RSF: 855,758

Tip 12: Click on a Cell in a Table and select ‘Keep’ or ‘Exclude’ as Another Filtering Option (image above)

To undo “Keep Only or Exclude”, use Revert button at top left of page



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How to Use the Customer Dashboard

General Guidance For All Views

Tip 13: Map Navigation Tools Appear When You Hover Your Mouse Over the Map

Map navigation tools are available. Start by hovering over the map to see them, then click into the right-arrow box for the full tool set.



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Zoom to a Specific Area - To zoom in to a specific area of the view, click the Zoom Area tool button on the view toolbar, and then drag to create the zoom area. If the view toolbar is hidden, hold down Ctrl + Shift (Command-Shift on Mac) to use the Zoom Area tool.



Pan Tool - To Pan, do one of the following. Hold down Shift, and then drag across the view. Or on the view toolbar, hover over the arrow, select the Pan tool, and then click and drag across the view.



Rectangular Selection Tool - The Rectangular tool selects marks within a rectangular shape. To use the Rectangular tool, hover over the arrow on the view toolbar, click the Rectangular tool button, and then click and drag across the view.



Radial Selection Tool - The Radial tool selects marks within a circular area. To use the Radial tool, hover over the arrow on the view toolbar, click the Radial tool button, and then click and drag across the view.

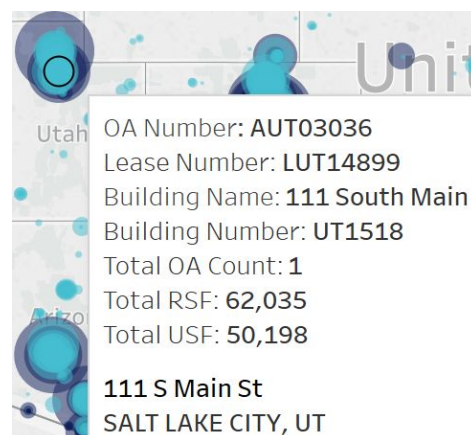


Lasso Selection Tool - With the Lasso tool, you can select multiple marks by drawing a freehand shape around them. This tool is useful when you want to include only certain marks, and exclude others around them. To use the Lasso tool, hover over the arrow on the view toolbar, click the Lasso tool button, and then draw a freehand shape around the marks you want to select.

Tip 14: Hover over Circle on a Map, or a Colored Bar on a Graph to See Details

Individual pieces of every graph, map or diagram show details when you hover

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How to Use the Customer Dashboard

General Guidance For All Views

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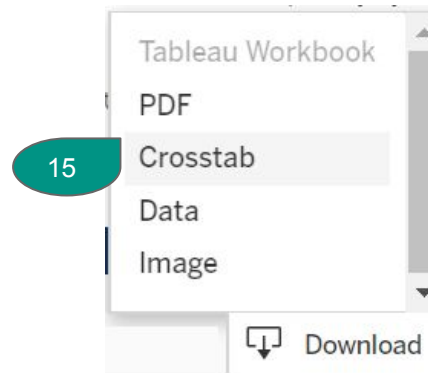
Section 3: How to Interact with Data Tables

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Tip 15: All data in the dashboard can be downloaded as a PDF or .CSV file

Any chart or graph in this dashboard can be exported. Click anywhere within the chart or diagram you'd like to export, select the 'Download' footer button, and 'Crosstab' for a .CSV file (Excel file). Selected filters will apply to the export



Each dashboard view (Projects, RWAs, Occupancies, Rent) has a **Full Dataset Export** which can be downloaded by following the instructions at the top-right of the view. Selected filters will apply to the export.

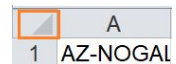
To export a .CSV report of this data, [click here](#) and then select 'Download' in the footer, followed by "Crosstab".

Tip 16: Eliminate Duplicate Projects In Your Export Using Excel 'Remove Duplicates' Function

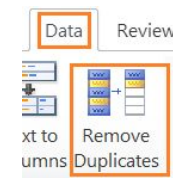
If you use the Full Dataset Report in Tip 15 to export agency-level data from My Projects, projects which are associated with multiple bureaus may duplicate on multiple rows in the export. *Note that if you export bureau-level data, you will not see this duplication.* To eliminate any duplicate rows in Excel:

1) Open the exported report in your Excel workbook

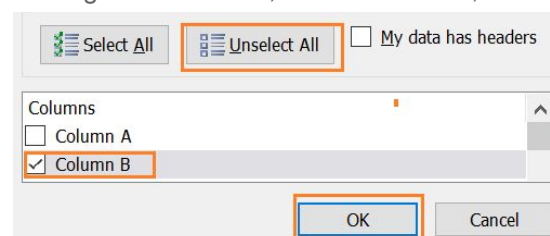
2) Select the grey box in the top-left corner of the dataset, between row 1 and column A



3) In the Data Tab of your Excel workbook, select 'Remove Duplicates'



4) Apply these settings - unselect all, check column B, select 'OK'



5) You can verify that duplicates are eliminated by highlighting column B, select 'Conditional Formatting' -> 'Highlight Cell Rules' -> 'Duplicate Values' -> 'OK'. If duplicates have been eliminated, no cells in column B will highlight

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Tip 17: Create a Printable PDF Report By Exporting the Project List, OA List, or RWA List

Select 'Download' in the footer, apply these settings. Deselect all 'Sheets to Download' except for the 'Project List', 'OA List' or 'RWA List' for an optimal report

Download PDF

Layout:

Portrait Landscape

Paper Size:

Letter

Scaling:

Automatic

Content:

This Dashboard Sheets in Dashboard Sheets in Workbook

Sheets to Download:

Final... Project Lifec... Project List Project Sche... Project Sche... Proje

Cancel Generate

Tip 18: Other Footer Buttons Explained:

Full Screen

Select this button to bring the dashboard view to full screen

Undo

Undo and Redo - You can perform unlimited undo and redo of your actions. You can undo almost all actions in Tableau by pressing the Undo button on the toolbar. Likewise, you can redo almost all actions by pressing the Redo button on the toolbar.

Redo

In this regard, every workbook behaves like a web browser. You can quickly return to a previous view. Or you can browse all the views of a data source that you have created. Tableau saves the undo/redo history across all worksheets until you exit. The history is not saved between sessions.

Revert

Revert allows you to undo the actions you have taken since your session started. Revert is a start-over button.

Refresh

Refresh - If a data source is changed, the view reflects those changes the next time you load the page. To manually update data while you interact with a view, click Refresh on the toolbar.

Pause

Pause - As you interact with a view, the server sometimes has to query the data source to update the view. To temporarily stop updates so you can more quickly interact with a view, click Pause on the toolbar.

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Data Dictionary

This dictionary contains term and acronym definitions for all dashboard elements. It is segmented by the four dashboard views, since the definition and data source may vary for a term depending on whether you are viewing it in relation to a project, occupancy or RWA.

Pages 18-30



Data Dictionary - My Projects

Data Element	Appears in Which Dashboard Section	Definition
Address	Project Details - Location, Statistics - Projects Map	Project location/worksites street address
Agency	Filters	Tenant agency which is a customer of a project
Building Name	Statistics - Projects Map	The name of the project location/ worksite building
Building Number	Filters	An eight-digit alphanumeric code assigned to each building in the PBS Inventory.
Bureau (Project Tenant)	Filters, Project List, Project Details - Identifiers	A combination of the 4-digit agency bureau code and name of the bureau which is a customer of a project.
City	Filters, Project Details - Location	The name of the city in which the project is located. If the city is listed in quotations in the dashboard, it is a city outside of the continental U.S.
Contracting Officer	Project Details-Team	Project Team Member. Individual with the authority to sign contracts on behalf of the Government.
Current Phase (Project Lifecycle Phase)	Filters, Project List, Statistics - Projects Map Project Details - Status	The latest phase of the PBS Project Lifecycle which a project has entered based on the latest schedule milestone achieved on a project. To learn more about alignment of project schedule milestones and lifecycle phases, see pages 37-42 of this guide.
Current RSF	Filters, Project Details - Location	Rentable Square Feet of current space. <i>In the dashboard, this data is available only for Lease Action project types.</i>
Current USF	Filters, Project Details - Location	Usable Square Feet (or ABOA) of current space. <i>In the dashboard, this data is available only for Lease Action project types.</i>
Customer POC	Filters, Project Details-Team	Name of the person representing the customer agency for a project.
Date Awarded (Lease, Construction, or Design/Build Contract)	Filters, Project List, Project Details - Identifiers	The date (day and year) a project has been assigned to a contractor to complete the scope of work or the date of Lease Award for Lease Acquisition Projects..
Date Requirements Finalized/Project Authorized/RWA Accepted	Filters	Date requirements were finalized, project was authorized, and/or RWA was accepted. One or several of these milestones will apply to a specific project, based on the project type. These milestones signify project authorization.

Term & Acronym Definitions

Data Dictionary - My Projects

Data Element	Appears in Which Dashboard Section	Definition
Estimated Annual Rent	Project Details- Lease Information	Estimated total annual lease contract value in dollars based on market research including Shell Rent, Operating Costs and Tenant Improvements, if applicable.
Existing/Prior Lease #	Project Details- Lease Information	The current/prior active Lease Number associated with a Lease Action project. In Lease Actions where the current lease will be replaced (Superseding Lease, Replacing Lease), this is the lease which will be replaced.
GSA Region	Filters, Project Details - Location	GSA Geographical Region which is responsible for managing the project. Visit the GSA.gov Interactive Regional Map to define which states align with which GSA regions.
GSA-Leased or GSA-Owned	Filters, Project Details - Location	Indicates whether the project site is a space which is commercially leased by GSA or is a building owned by GSA. If this field is blank for a project record, the space may not have been chosen yet, or the project may take place in multiple locations.
Lease #	Project List, Project Details- Lease Information	Lease Contract number assigned to the lease resulting from a project. In Lease Actions where the current lease will be replaced (Superseding Lease, Replacing Lease), this is the new lease # which will replace the existing/prior lease.
Lease Action	Project Details- Lease Information	Action that is completed as a result of the project work; i.e. Lease Reduction, Superseding Lease, etc.
Lease Termination Date	Project Details- Lease Information	Date the existing/prior lease with GSA ends and the space is no longer controlled by GSA
Leasing Specialist	Project Details-Team	GSA project team member, leasing specialist
Leasing Supervisor	Project Details-Team	GSA project team member, leasing supervisor
OA #	Project List, Project Details- OAs	Occupancy Agreement Number associated with the project. The OA # may apply to current space or a new space with a follow-on OA, depending on the project type. Some of the Occupancy Agreements associated with your project may be with other agencies. <i>Due to system limitations, related OAs are not available for ePM project types at this time.</i>
OA Current RSF	Project Details- OAs	Rentable Square footage of an Occupancy Agreement associated with a project
OA Current USF	Project Details- OAs	Usable (or ABOA) Square footage of an Occupancy Agreement associated with a project
OA Expiration Date	Project Details- OAs	Expiration date of an Occupancy Agreement associated with a project
OA Status	Project Details- OAs	Status of an Occupancy Agreement associated with a project; i.e. Draft or Final
OA Tenant	Project Details- OAs	Agency bureau occupying the space subject of the Occupancy Agreement

Term & Acronym Definitions

Data Dictionary - My Projects

Data Element	Appears in Which Dashboard Section	Definition
Primary Funding Type	Filters, Projects Summary Chart Project List Project Details - Identifiers	The primary GSA funding mechanism of a project. For projects with multiple funding sources (BA55, RWA, General Tenant Improvement, etc), this is the primary source. See pages 33-34 of this guide for more information on project funding.
Project #	Project List	Unique project number. The structure of a Project number will vary by Project Type. See page 32 for more on project types and expected project # structures.
Project Identifier	Project Details, Select-A-Project Pick-List	Project # (defined above) + associated RWA # or PCN # (see RWA / PCN # on the next page for definition).
Project Description	Project Details - Identifiers	Description of the project
Project Lifecycle Phase (Current Phase)	Filters, Project List, Statistics - Projects Map Project Details - Status	The latest phase of the PBS Project Lifecycle which a project has entered based on the latest schedule milestone achieved on a project. To learn more about alignment of project schedule milestones and lifecycle phases, see pages 37-42 of this guide.
Project Lifecycle Sub-Phase	Filters, Project Schedule	Sub-phase within the PBS Project Lifecycle in which the project is currently, according to the latest milestone achieved.
Project Manager	Project Details - Status	The person assigned to lead the project team in achieving the project objectives. The PM has the primary role in any project and must ensure that the project is planned, executed and managed properly. The PM's focus is on planning, leading, communicating, resourcing and, most importantly, building team consensus and participation in all aspects of planning and executing a project.
Project Name	Project List, Project Details, Select-A-Project Pick-List	Title assigned to a project. Typically includes the project worksite State, City and Building Name and a very brief description of work.
Project Sponsor	Project Details-Team	The Sponsor acts as a project champion, supporting the project team, advocating for the project and taking necessary actions to ensure the project is successful. This individual is typically the PM's first-line supervisor, a senior executive, manager or someone who is personally invested in the project team's success.
Project Type	Filters, Projects Summary Chart, Project List, Project Details - Identifiers	Category of project such as Repair and Alteration, New/Replacing Lease, Study Only, Post Lease Alteration, etc. The Project Type is an important determinant of the data available in the My Projects dashboard view. Project Schedules, Financials and identifying information are all determined by project type. See page 32 of the User Guide for a listing of project types.

Term & Acronym Definitions

Data Dictionary - My Projects

Data Element	Appears in Which Dashboard Section	Definition
Proposed RSF	Project Details - Location	Rentable Square Feet requested as a result of a project. <i>In the dashboard, this data is available only for Lease Action project types.</i>
Proposed USF	Project Details - Location	Usable Square Feet requested as a result of a project. <i>In the dashboard, this data is available only for Lease Action project types.</i>
RWA / PCN #	Project List, Project Financials	<p>A Reimbursable Work Authorization (RWA) Number or a Project Control Number (PCN) associated with a project. For RWA/RETA-only projects, this is the same as the project number and also the primary (only) funding source. For all other project types, the RWA or PCN is a funding mechanism for project work. The RWA / PCN # associated with a project will determine what funding information is available in Project Financials chart in Project Details.</p> <p>An RWA is the unique identifier assigned to an RWA. An RWA is an agreement between GSA and a Customer whereby GSA agrees to provide materials and/or services, and the Customer agrees to reimburse GSA's costs.</p> <p>Project Control Number (PCN) is generated in GSA's Inventory Reporting Information System (IRIS) and serves as a unique funding identifier for construction, repair and alteration projects.</p>
RWA Funding	Project List	Total funding for a project coming from RWAs. For RWA/RETA-only projects, this is the full funding amount. For other project types, this might be one of several funding sources.
State	Filters, Project Details - Location	The name of the state in which the project is located.
Status Notes	Project Details - Status	Last updated narrative status of the project.
Sub-Phase (Project Lifecycle Phase)	Filters, Project Schedule	Sub-phase of the PBS Project Lifecycle in which the project is currently, according to the latest milestone achieved.
Total Funding (All Sources)	Filters, Project List, Project Financials	Total authorized funding amount for a project. Whether the project has one funding mechanism or multiple funding sources, this is the sum of the 'Funding, Authorized Amount' column in the Project Financials chat. Total funding is the amount sanctioned through legislation approving the use of public monies for stated purposes.
Total Obligations	Project List	Sum of all obligations (amount of funding obligated to contractors for specified work) for a project

Term & Acronym Definitions

Data Dictionary - My Projects

Terms in the Project Financials Chart

See pages 33-34 of this guide for more information on project financials

Data Element	Appears in Which Dashboard Section	Definition
Funding Source	Project Financials	Budget Activity code or short-description of the source of authorized funding
ID	Project Financials	Funding ID, such as RWA # for BA80 (RWA) funding, or PCN # for BA54/55/61/etc. funding
Description	Project Financials	Brief description of the funding source, type or scope of what is being funded
Funding Bureau	Project Financials	Bureau which is financing the authorized amount on the relevant funding line
Effective Date	Project Financials	Date the funding becomes effective
Expiration Date	Project Financials	Date the funding expires
Last Updated	Project Financials	Date the funding information was last updated in a source system
Funding, Authorized Amount	Project Financials	Authorized funding amount, sanctioned through legislation approving the use of public monies for stated purposes.
Amount Obligated	Project Financials	Dollar amount of funding which has been obligated to contractors for specified work
Remaining Balance	Project Financials	Amount of authorized funding which remains unobligated

Terms in the Project Schedule

See pages 36-42 of this guide for more information on project schedules

Data Element	Appears in Which Dashboard Section	Definition
Schedule Last Updated	Project Schedule	Date the project schedule was last updated in the project source system
Project Schedule Type	Project Schedule	Type of schedule. For most projects, this is the Project Template, which determines which schedule milestones apply to the project.
Milestone	Project Schedule	Specific dates associated with all project activities and interim steps needed to implement the project.
Planned Date	Project Schedule	Estimated completion date for a given Project Milestone
Actual Date	Project Schedule	The date the the work associated with the noted milestone is complete.

Data Dictionary - My RWAs

Data Element	Definition
Acceptance/Start Date	Date RWA was accepted by GSA.
Agency Accounting Data	Customer agency's accounting string from which RWA bills will be paid.
Agency Location Code	Eight-character code assigned by the Department of the Treasury for billing customer agencies via the IPAC system.
Authorized Amount	Total RWA amount accepted between GSA and the customer. Upon RWA acceptance, the customer must obligate this full amount on their books.
Billed Office Address Code (BOAC) / Account Code	Six-character code that identifies a unique combination of Agency Bureau Code + Billing address + Agency Location Code (when applicable for IPAC customers only). The BOAC/Account Code is the primary code used to query RWA Bills when using the Vendor and Customer Self-Service (VCSS) Portal.
Total Billed	Dollar amount GSA has billed to the customer agency for expenses and fees related to an RWA.
Building Name	Name of the primary worksite building.
Building Number	An eight-character code that uniquely identifies a building or a facility. Is also sometimes referred to as the Primary Work Site.
Bureau	Combination of Agency Bureau Code and Agency Bureau Name for which the RWA work is being performed and must reimburse GSA.
Cancellation Date	Date the RWA was canceled, if applicable. This data element is visible in the Data Export only.
Customer Order #	Customer Agencies may populate this field to use for their internal tracking purposes.
Customer POC (Name, Email, Phone)	Contact information of the primary customer point of contact for the RWA.
Expenses	An expense is an expenditure of money, a cost, or something requiring the expenditure of money when delivering or procuring goods, or providing services. This data element is visible in the Data Export only.
Agency Accounting Data	Customer agency's accounting string from which RWA bills will be paid.
Agency Location Code	Eight-character code assigned by the Department of the Treasury for billing customer agencies via the IPAC system.
Fiscal Year Accepted	Fiscal year in which the RWA was accepted by GSA.
Fiscal Year Complete	Fiscal year in which the RWA work was substantially completed.

Term & Acronym Definitions

Data Dictionary - My RWAs

Data Element	Definition
Fund Expiration Date	<p>The final date in which funds can be liquidated against an RWA. After this date, the funds are returned to Treasury and no longer available for use. This date is always 5 full fiscal years after the Fund's Expiration Date of Obligational Authority, with the exception of F-Type RWAs, which expire on September 30th of the fiscal year in which they are accepted.</p> <p>Related Term: Expiration Date of Obligational Authority is the final date in which funds can be obligated by the customer, which occurs when GSA accepts the RWA. After this date, the funds are available until the fund expiration date, as detailed above. This data element is not found in the PBS Customer Dashboard.</p>
Fund Type (Most Recent)	The type of appropriation cited on the RWA, i.e. annual, multiple year, and/or no-year funds. In the PBS Customer Dashboard, this reflects the <i>most recent</i> fund type which means that if the fund type changed with an amendment to the original RWA, this may not be the same fund type as the original RWA.
Fund Year (Most Recent)	The fiscal year of funding the customer certifies as available for reimbursement of this RWA. In the PBS Customer Dashboard, this reflects the <i>most recent</i> fund year, which means that if the fund year changed with an approved amendment to the RWA, this may not be the same fund year as the original accepted RWA.
Funding Authority	The authority under which the RWA should be executed.
GSA PM/POC (Name, Email, Phone)	GSA Project Manager or primary GSA POC associated with this RWA
GSA Region	The GSA region performing the work.
GSA-Leased or GSA-Owned	Indicates whether the primary worksite of the RWA is in GSA-owned or GSA-leased space.
Lease #	This is the GSA Lease Number.
Lifecycle Phase	Phase within the project lifecycle as an indicator of the status of the RWA. See the RWA Content Guide, page 44 of this guide, for lifecycle phase descriptions
Obligations	This refers to GSA's "reobligation" of the customer funds to deliver the RWA scope of work.
% Obligated	Percentage of the total authorized amount which has been obligated by GSA to date.
Project Description	Description of the service/work to be provided.
Quarter of Acceptance Date	Fiscal quarter in which the RWA was accepted by GSA.

Term & Acronym Definitions

Data Dictionary - My RWAs

Data Element	Definition
Related Project #	If this RWA is associated with another project ID in a GSA source system, the project ID(s) will be listed here.
Remaining Balance	Dollar amount remaining to be obligated on an RWA. This is the difference between the authorized amount and the obligated amount.
RWA Number	The tracking number associated with all RWAs. It starts with a letter (A,B,C,D,F,N, or R depending on the type), followed by seven numeric digits.
RWA Type	Type or category of RWA. These are the types you will see in the PBS Customer Dashboard: A: Standalone project split-funded by PBS and customer (example: Construction and/or design services in federal space) B: Project related to PBS prospectus level project that is split funded by PBS and customer (example: Tenant-funded work associated with a PBS prospectus project) F: Small, miscellaneous, routine project or service, which cannot exceed \$25,000 per transaction and \$250,000 total (example: changing door knobs or key locks) N: Standalone project or service funded completely by customer (examples: space changes; overtime utilities in leased space) R: Recurring services or overtime utilities in owned space
Service Type	Severable Service: Value is received as the service is rendered, e.g. cleaning windows, overtime utilities, etc. Non-severable Service: Value is received only once the entire service is performed, e.g. office renovation, buildout, etc.
Substantial Completion Date	Date the RWA was marked substantially complete, meaning the project or service can be operated or occupied for its intended use, even if minor repairs or punch list items are still needed.
Substantial Completion Letter Date	The date GSA sends the substantial completion letter to the customer. This indicates the work requested on the RWA has been completed and the project or service can be operated or occupied for its intended use, even if minor repairs or punch list items are still needed. This does not indicate financial closeout of the RWA, and the customer should not deobligate funds after receiving the substantial completion letter.
Treasury Account Symbol	Mandatory field for all federal customers and is validated by Treasury during each monthly billing cycle. The Department of Treasury's "Shared Accounting Module (SAM)" website contains a list of all valid Treasury Symbols for every agency. Valid Treasury Symbols are updated every 24-48 hours. Visit Treasury's SAM site and download the latest Excel file labeled "Intergovernmental".

Term & Acronym Definitions

Data Dictionary - My Occupancies

Data Element	Definition
Agency Tracking Number	Free entry box with no established entry criteria. Many customers request to use this box to enter identifiers that allow customers to track projects. Example: Courts request the OA Planner Number be entered; SSA may provide a Doors Code; etc.
Alternate Billing Contact (ABC)	In general, the ABC is the Business Analyst for the customer. It is not required, but may be used in some situations. This field is on the Rent Bill; if no name is entered then the RGA (Responsible Government Associate) will be the primary point of contact for billing questions.
Building Address	Address of the building which houses the Occupancy
Building Name	Name of the building which houses the Occupancy
Building Number	GSA's universal building identifier, comprised of the state abbreviations + a four-digit location code + Facility Indicator (Example: WA0101ZZ - State-XXXX-ZZ (stand-alone building))
Bureau	A combination of the 4-digit code and name of the bureau identified as the primary or sole occupant in the Occupancy Agreement
Count of Personnel	This is the number of occupants (Federal, contractors, task force, etc) that occupy the space being identified on the OA
Date Lease Termination Rights Begin	In GSA-Leased locations, this information identifies when, and if, the underlying lease contract has termination rights
Days to Terminate All Space	If the Lease has termination rights, how many days notice must be provided by GSA to terminate the space assigned to the lease, in total (all of the space)
Days to Terminate Part Space	If the Lease has termination rights, how many days notice must be provided by GSA to terminate the space assigned to the lease, in part (part of the space)
Fiscal Year Expiration	Fiscal Year in which the Occupancy Agreement will expire
GSA Leased or GSA Owned	Indicates whether the building is owned by GSA or commercially leased by GSA
GSA Region	The GSA region (1 through 11) which houses the occupancy
Initial Engagement to Discuss CPA	Due date for Occupancy Planning milestone: Initial Engagement between GSA and the customer to discuss strategic requirements (36 months prior to OA expiration)
Lease #	Identification number for a GSA commercial lease, if the OA is in commercially-leased space
Lease Effective Date	Date the related GSA commercial lease became effective, if the OA is in commercially-leased space. In most instances it will be the same date as the OA effective date
Lease Expiration Date	Date the related GSA commercial lease will expire, if the OA is in commercially-leased space, in most, but not all instances, will be the same dates at the OA expiration date

Term & Acronym Definitions

Data Dictionary - My Occupancies

Data Element	Definition
Strategic Requirements Finalized Milestone Target Date	Due date for the Occupancy Planning Milestone, which is based on number of months from today until OA expiration. See page 46 of this guide for Occupancy Planning Lifecycle Phases, Milestones and timeline
Non-Cancelable	If based on Pricing Policy (see Pricing Desk Guide, Chapter 5, § 5.1, Cancellation Rights, link on page 47) the Occupancy is deemed Non-Cancelable, it will be marked Yes; otherwise, it will be marked No
OA Version #	Version number of the OA in the dashboard view is the current final billing OA version. Amendments to OAs, such as operating cost escalations, step rents, expansions, reductions, annual rate resets, etc, will create a new version number
OA Effective Date	Date the Occupancy Agreement became effective
OA Expiration Date	Date the Occupancy Agreement expires
OA Number	Unique identifier for an Occupancy Agreement a customer has with GSA to occupy a GSA-owned or GSA commercially-leased space
Responsible Government Associate (RGA)	The RGA is generally the main point of contact for an OA.
ROI OA / ROI Priced	If the pricing strategy identified for the location is Return on Investment, this will be marked Yes; if not, it will be marked No. (see Pricing Desk Guide, Chapter 6 <i>Return on Investment Pricing</i> for more information)
Rentable Square Feet (RSF)	The area for which the tenant agency is charged Rent; may include a share of building support and common areas. Rentable Square Footage of the Occupancy is the Usable Square Feet times the Common Area Factor or Usable/Rentable Ratio
Strategic Requirements Finalized	Due date for Occupancy Planning milestone: strategic requirements are finalized and Client Project Agreement is signed
Structured Parking	This the number of assigned Structured Parking spaces for the OA
Surface Parking	This the number of assigned Surface Parking spaces for the OA
Technical Requirements Finalized	Due date for Occupancy Planning milestone: full technical and functional requirements are finalized
Usable Square Feet (USF)	The area where a tenant agency normally houses personnel and/or furniture. Usable Square Footage of the Occupancy is the space the customer "occupies".

Data Dictionary - My Rent

Data Element	Definition
Shell Rental Rate	Amount of payment due for occupancy of the building shell. The building shell is a structure in which the house systems are present and operational; however, only perimeter walls are present. It does not include services or alterations. The shell rental rate reflects the amount stated in the occupancy agreement.
Amortized Tenant Improvement Used / General	Amount of general tenant improvements provided for the tenant. This rate is the same for all agencies is normally amortized over terms set in the occupancy agreement.
Operating Costs	The cost of operating a property at a standard level of service, including both the cost in the lease and any separate contract costs for providing operating services to the premises. This cost will be adjusted annually for escalation if the lease reflects that provision.
Real Estate Taxes	Reflects real estate taxes due in the current year, based on the terms of the lease as specified in the occupancy agreement. Lump sum adjustment payments will appear on line 14a or 14b as they are processed.
Amortized Tenant Improvement Used / Customization	Actual cost of tenant improvements as amortized in the lease, less the line item for Amortization of General Component of Tenant improvement allowance used. It is added after market rent as it is a reflection of special needs of the agency, is not part of market comparable space and, is normally amortized over terms set in the occupancy agreement.
GSA-Installed Building Improvements	Agency share of amortized costs for building improvements installed by GSA (e.g. Heating, Ventilation and Air Conditioning upgrades) over and above what is stated in the lease contract.
Building Specific Amortized Capital	Amortized capital costs for building specific furniture, fixtures and equipment (e.g. magnetometers, x-ray machines, closed circuit cameras and monitors, etc.)
Structured Parking	Charges for available parking, if not already included as part of Shell Rental Rate. The annual rate reflects rate per space. Structured parking spaces are under cover (e.g. garage)
Surface Parking	Charges for available parking, if not already included as part of Shell Rental Rate. The annual rate reflects rate per space. Structured parking spaces are without cover (e.g. parking lot)
Rent Charges for Other Space	Charges for other types of space, such as wareyards, bridges, helipads, etc. This line item will be itemized by category.
PBS Fee	Amount charged to an agency to cover GSA costs associated with lease acquisition, property management services, and indemnification from risks that GSA assumes, most notably the risk of vacancy. This item will be automatically recalculated by the OA Tool system, if square footage changes are made.

Term & Acronym Definitions

Data Dictionary - My Rent

Data Element	Definition
Pro Rata Joint Use Charges	Reflects the agency's proportionate share of building, facility or community space available for the use of all tenants. Joint use charges are calculated based on the percentage of space the agency occupies in the building, facility or community compared to the total space available for occupancy on the building, facility or community.
Total Monthly Rent	Total or market rent charges, agency rent charges (or credits), and joint use space. Sum of line items above
Billing Adjustments & Corrections	Modifications to the bill to either correct errors in the previous billing cycles, or to reconcile total rent billed because of rent exemptions, caps, or trust fund adjustments, lump sum tax adjustments
Antenna	License fees for rooftop antennas. Itemized by category.
Reimbursable Services	Costs for extra services: (e.g. 24-hour operation of a computer room) Itemized by Services
Total PBS Bill	Sum of Total Monthly Rent, billing adjustments & corrections, Antenna charges and reimbursable services

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Details to Understand Dashboard Content

Links to Resources, Policy and Training on GSA Projects, RWAs, OAs and Rent Bills

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Content Guide

My Projects

Project Types

There are 3 major categories of Project Type in the customer dashboard

1. Lease Action Project Types

Project # Structure: # + [State Abbreviation] + ####, **exe 0KY2058**

New Lease
New/Replacing Lease
Succeeding Lease
Superseding Lease
Lease Expansion
Lease Reduction

2. RWA/RETA-only Project Types

Project # Structure: 1 Letter followed by 7 numbers, **exe N186307**

A Type RWA - Projects in Federally Owned Space with funding from PBS and Customer
B Type RWA - Projects related to PBS Prospectus Projects
N Type RWA - Projects Related to Build-out of Space and/or Services
F Type RWA - Small Misc. Projects and Services

3. ePM Projects Types (all other Projects)

Project # Structure: Typically 5 numbers (count may vary), **exe 35820**

Called 'ePM projects' since they are tracked in PBS' ePM project management system

Design Only	Post Occupancy Lease Alteration
Disaster Supplemental Funding	Repair and Alteration above \$25,000
Energy/Water Project	Repair and Alteration below \$25,000
Fire and Life Safety Project	Service Contracts
Furniture, Fixtures and Equipment (FF&E)	Site Only
Judicial Security Project	Space Consolidation Project
Lease Procurement	Study Only
New Construction	BA54 B-List Project
Non-Space Projects	Other

Defining the relationship between RWAs and Projects

- RWA/RETA-only projects are RWA standalone projects which are tracked only in GSA's RETA system and are not tracked in GSA's ePM system. The distinction is made in the dashboard due to the availability of some data in the RETA system vs. the ePM system.
- An RWA can be a standalone project, or it can be a segment of work within a larger Lease Action or ePM project. Either way, the RWA represents a scope of work, and it also represents a funding mechanism for that scope. RWAs for standalone projects are the primary (only) funding mechanism. RWAs which are a segment of a Lease Action or ePM project may be one of several funding sources for that project.
- RWA/RETA-only projects in My Projects are active, so you will also see them in My RWAs view. An RWA which is a segment of a Lease Action or an ePM project will not show in My RWAs if it is a completed, closed RWA.



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My Projects

Project Financials

PBS Projects are often funded through multiple sources, with a Primary Funding Type assigned based on the source of the majority of project funding. GSA uses standard Budget Activity (BA) Codes, a two-character code which represents a program area to which funds are allocated.

- The primary funding type for **Lease Action project types** is Rental of Space (BA53)
- The primary (only) funding type for **RWA/RETA-only project types** is Reimbursable Work Authorization (BA80)
- **ePM projects** can be associated with a variety of funding types, listed here, and one is assigned in ePM as the Primary Funding Type.

New Construction and Site Acquisition (BA51)
 Lease Minor Repairs and Alterations (BA54)
 Minor Repairs and Alterations (BA54)
 Major Repairs and Alterations (BA55)
 Special Emphasis, Repairs and Alterations (BA55Light)
 Building Operations, Overhead (BA61)
 Energy Rebate (BA63)
 Historic Program Funds (BA64)
 Reimbursable Work Authorization (BA80)
 Recovery Act, Green Buildings (BA03, BA04, BA05)
 Special Emergency Funding (192E-BA51, 192E-BA53-56, 192E-BA61)

How to Read the Project Financials Chart in Project Details section:

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
RWA	N1533987	Rooms 5215 - replace door hard..	04704 : GENERAL SERVICES ADMI..	10/1/2015	9/30/2019	7/7/2017	\$23,834	\$21,162	\$2,672
Grand Total							\$23,834	\$21,162	\$2,672

- **Funding Source:** Budget Activity code or short-description of the source of authorized funding
- **ID:** RWA # for BA80 (RWA) funding, or PCN # for BA54/55/61/etc. funding
- **Description:** Brief description of the funding source, type or scope of what is being funded
- **Funding Bureau:** Bureau which is financing the authorized amount on the relevant funding line
- **Effective Date:** Date the funding becomes effective
- **Expiration Date:** Date the funding expires
- **Last Updated:** Date the funding information was last updated in a source system
- **Funding, Authorized Amount:** Authorized funding amount, sanctioned through legislation approving the use of public monies for stated purposes.
- **Amount Obligated:** Dollar amount of funding which has been obligated to contractors for specified work
- **Remaining Balance:** Amount of authorized funding which remains unobligated
- **Grand Totals:** Sum of authorized funding amount (this is equal to 'Total Funding, All Sources' in Project List), sum of obligations, sum of remaining funding unobligated balance



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My Projects

Project Financials

How to Read the Project Financials Chart in Project Details section:

Blank Fields

- A blank field typically means the data is not available in the source system
- A row which is blank other than 'ID' and 'Amount Obligated' represents an instance where Obligations data sources from a separate system from Authorized Funding, so you will see 'Amount Obligated' on a separate line from the Funding Source(s), even though they are related.
 - In the following example, \$11,677,000 is the authorized funding for this project, against which \$731,887 has been obligated in segmented amounts.

Project Financials									
Funding Source	ID	Description	Funding Bureau	Effective Date	Expiration Date	Last Updated	Funding, Authorized Amount	Amount Obligated	Remaining Balance
Multiple	RVA00279	-	-	-	-	-		\$247,168	
		2018_BA55_R3_VA0062ZZ_Alt...	4700 : General Services Administr...	-	-	8/24/2018	\$11,677,000		
	RVA00397	-	-	-	-	-		\$372,915	
	RVA00448	-	-	-	-	-		\$111,804	
Grand Total							\$11,677,000	\$731,887	

- Remaining Balance may be blank because of the disassociation described above.
 - To find 'Remaining Balance' in a chart like the one above, click anywhere in the financial chart, select 'Download' in the footer, followed by 'Crosstab', to export a .CSV version of the chart. Open the export in Excel and subtract the obligated amounts from authorized amounts to calculate remaining balance.



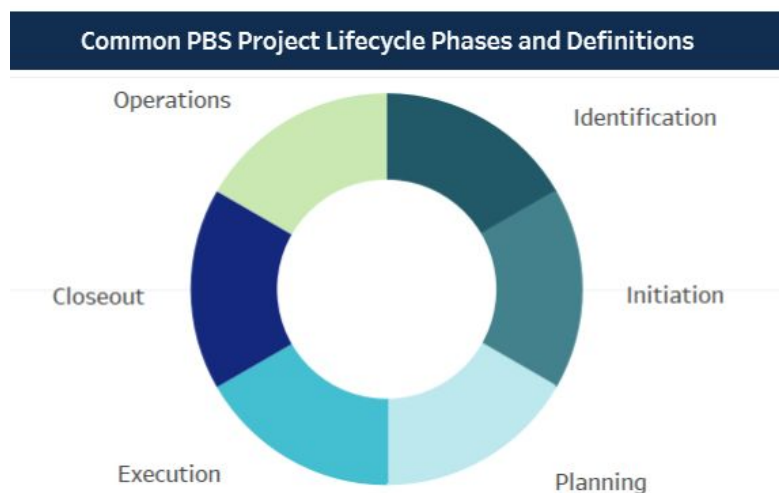
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My Projects

Project Lifecycle Phases

You will see a 'Current Lifecycle Phase' applied to all of your projects as a means to categorize the status of your project. PBS has established a common set of Lifecycle Phases which projects of all types fit into.

A project has entered a specific Lifecycle Phase as soon as the first schedule milestone within that phase has been completed.



Definitions

Identification Phase includes programmatic planning, summary needs interview, summary requirements developed, project parameters defined, utilization rate considered, Client Project Agreement developed, business decision to proceed determined

Initiation Phase includes validation of project summary requirements, initial risk determined, project charter developed, project sponsor and manager assigned, preliminary project budget and schedule discussed

Planning Phase includes development of project management and communications plans, detailed needs interview, detailed requirements developed, utilization rate decisions, project budget and schedule finalized, Reimbursable Work Authorizations submitted / accepted

Execution Phase includes acquisition, design, construction

Closeout Phase includes Reimbursable Work Authorization closeout, contract(s) closeout, finalize Occupancy Agreement for rent billing, punchlist closeout, property management transition

Operations Phase indicates project is complete, includes space operation and maintenance, occupancy management, occupancy agreements maintained and managed, rent billed



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My Projects

Project schedule milestones vary by project type, funding amount and other factors. Your local project manager is the best source for understanding your project schedule and progress. Here are some of the typical sets of project schedule types and milestones you will see in the dashboard:

Project Schedule Type: **Small Project with Design**

Milestone

Customer Request
 Project Initiated
 Customer Concurrence on final scope, schedule and cost estimate
 Initial Scope and Requirements Finalized With Customer
 Project Authorization/ RWA Acceptance
 Construction Start/NTP
 Substantial Completion
 Construction or Design/Build Contract Award
 Contracting Accepts Construction or Design/Build PR
 PM Submits Construction or Design/Build PR

Project Schedule Type: **Post Occupancy Lease Alteration >\$25K**

Milestone

Customer Request
 Project Initiated
 Initial Scope and Requirements Finalized With Customer
 Customer Concurrence on final scope, schedule and cost estimate
 Project Authorization/ RWA Acceptance
 Request Lessor Pricing
 Issue Lease Amendment for Alterations
 Construction Start/NTP
 Substantial Completion
 Project Closeout

Project Schedule Type: **Lease Actions**

Milestone

Customer Request
 RWA Funds in Place for Prospectus Projects
 Requirements Finalized
 Acquisition Plan Finalized
 Initial Financial Assessment with Signed Customer Draft OA
 Substantial Completion Acceptance of Space
 Design Intent Drawings Complete
 Customer review and acceptance of Construction Drawings
 Transmittal of Solicitation Package
 Receipt of Initial Offers
 Signed OA Document for Award
 Lease Award
 TI Costs Approved and NTP Provided
 Punch List Complete
 Lease Term Commencement

Project Schedule Type: **Small Project with NO Design**

Milestone

Project Authorization/ RWA Acceptance
 Construction Start/NTP
 Substantial Completion
 Construction or Design/Build Contract Award
 PM Submits Construction or Design/Build PR

Project Schedule Type: **RWA**

Milestone

RWA Start
 Project Authorization/RWA Acceptance
 Substantial Completion Date
 Financial Closeout

ePM 1.3 Master Project Template

Milestone

Construction Start/NTP
 Substantial Completion
 CMa Award
 Construction or Design/Build Contract Award
 Construction Complete
 Occupancy



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My Projects

Milestone Definitions for ePM Project Types

Here are definitions of the most common sets of project milestones for ePM projects. These milestones are listed in sequential order of an expected project timeline.

Milestone Name	Phase - Sub Phase	Definition
Customer Request	Identification	A trigger event occurs from an internal or external customer. PBS acknowledges a request from a customer to perform work.
Project Initiated	Initiation	The project is started, in response to the trigger event. The organization has committed resources to planning the project. A permanent PM may be assigned or it may be assigned to a Program Manager or Planner Estimator. Project charter created at this point (if applicable).
Initial Scope & Requirements Finalized With Customer	Planning	The high-level objectives of the project have been defined and documented with the internal or external customer. Also known as Functional Requirements developed. The Initiation phase of the project is complete.
Pre-Design/Study Award	Planning	Feasibility, Program Development Study, and/or other planning phase contracts awarded.
Pre-Design/Study Complete	Planning	Feasibility, Program Development Study, and/or other planning phase contracts completed.
Customer Concurrence on final scope, schedule and cost estimate	Planning	The project has been planned in detail. This should include the Project Plan, Acquisition Plan, Requirements Package, Statement of Work, detailed schedule, and detailed cost estimate. The options have all been presented, and the Customer agrees on the results of the planning. The detailed acquisition schedule has been planned with the Contracting Officer. The Planning phase of the project is complete.
Initial Financial Agreement w Customer	Planning	A draft occupancy agreement and/or other financial agreement is in place with customer.
Define Project Funding Requirement	Planning	Total project costs are estimated in preparation for funding request submittal
Requirements Finalized	Planning	All project and stakeholder requirements are finalized.
Project Authorization/ RWA Acceptance	Execution	Project is authorized and/or RWA mutual acceptance has occurred. For capital projects, the project has received Congressional/OMB/GSA approval to move forward.
Congressional Appropriation	Execution	Project has received Congressional appropriation funding.
Site Acquisition Start	Execution - Site Procurement	Site procurement has started.
Site Acquisition Complete	Execution - Site Procurement	Site procurement has ended.
Design Acquisition Plan Finalized	Execution - Design	GSA formalizes acquisition plan for the design contract, and necessary stakeholders have approved.



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My Projects

Milestone Definitions Continued

ePM Project Types

Milestone Name	Phase - Sub Phase	Definition
Design PR Submitted	Execution - Design	The Procurement Request (PR) is submitted for approval to proceed with the acquisition of the design.
Contracting Accepts Design PR	Execution - Design	The Acquisition office officially receives the package as being acceptable to start the design acquisition. The Procurement Action Lead Times (PALT) cycle times commence once the package has been accepted.
Design RFP Published in FedBizOpps	Execution - Design	GSA formally issues Design Request for Proposal on FedBizOpps for A/E firm response.
Design RFP Proposals Received	Execution - Design	Firms provide proposals in response to GSA-issued Design Request for Proposal.
SSEB/Design Firms Shortlisted	Execution - Design	GSA convenes Source Selection Evaluation Board and/or finalizes shortlist of potential design firms.
Design Firm Selected and Price Proposal Requested	Execution - Design	GSA selects the design firm and requests the firm submit formal pricing.
Design Award	Execution - Design	Design services have been awarded.
AiA Award	Execution - Design	Art in Architecture contract has been awarded.
Design Start / NTP	Execution - Design	The contractor is given authority to begin the design.
Design Excellence Peer Review #1	Execution - Design	Date of first design excellence peer review.
Concept Design Approval (Commissioner's Presentation)	Execution - Design	The PBS Commissioner reviews the project's concept design, and provides formal approval for the project to continue.
Design Excellence Peer Review #2	Execution - Design	Date of second design excellence peer review.
CD's 15% Development Submission	Execution - Design	A/E submits 15% construction documents package, or comparable milestone for D/B or Bridging delivery methods.
CD's 50% Development Submission	Execution - Design	A/E submits 50% construction documents package, or comparable milestone for D/B or Bridging delivery methods.
CD's 90% Development Submission	Execution - Design	A/E submits 90% construction documents package, or comparable milestone for D/B or Bridging delivery methods.
AiA Meetings Requiring Customer Presence 1 - Initial Art Panel Meeting	Execution - Design	Date of the initial Art in Architecture meeting.
AiA Meetings Requiring Customer Presence 2 - Artist Selection Meeting	Execution - Design	Date of the Art in Architecture artist selection meeting.



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My Projects

Milestone Definitions Continued

ePM Project Types

Milestone Name	Phase - Sub Phase	Definition
AiA Meetings Requiring Customer Presence 4 - Artist Site Visit	Execution - Design	Date of the Art in Architecture artist site visit.
AiA Meetings Requiring Customer Presence 5 - Artist Concept Presentation	Execution - Design	Date of the Art in Architecture concept presentation.
Design Complete	Execution - Design	Design is complete and accepted.
CMA Award	Execution - Procurement	Construction Manager services are awarded.
Signed Occupancy Agreement(s)	Execution	GSA customers impacted by the project sign draft occupancy agreements.
Construction or Design/Build Acquisition Plan Finalized	Execution - Procurement	GSA formalizes acquisition plan for the construction or design/build contract, and necessary stakeholders have approved.
PM Submits Construction or Design/Build PR	Execution - Procurement	The Procurement Request (PR) is submitted for approval to proceed with the acquisition of the construction contractor. For Design/Build projects this is the PR for the whole acquisition.
Contracting Accepts Construction or Design/Build PR	Execution - Procurement	The Acquisition office officially receives the package as being acceptable to start the acquisition. The Procurement Action Lead Times (PALT) cycle times commence once the package has been accepted.
Construction or Design/Build RFP Issued	Execution - Procurement	GSA formally issues Construction or Design/Build Request for Proposal.
Request Lessor Pricing	Execution - Procurement	The Acquisition office officially requests pricing from lessor.
Construction or Design/Build Proposals Received	Execution - Procurement	Firms provide proposals in response to GSA issued Construction or Design/Build Request for Proposal.
Construction or Design/Build Firms Interviews Complete	Execution - Procurement	GSA completes interviews with prospective construction or design/build firms.
Successful Construction or Design/Build Firm Selected	Execution - Procurement	GSA selects the construction or design/build firm.
Construction or Design/Build Contract Acquisition/Legal Reviews Started	Execution - Procurement	Construction or Design/Build contract award package routed for GSA Legal review.
Construction or Design/Build Contract Acquisition/Legal Reviews Completed	Execution - Procurement	Construction or Design/Build contract award package formally reviewed/approved by GSA Legal.
Construction or Design/Build Contract Award	Execution - Procurement	The construction or Design/Build services have been awarded.



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My Projects

Milestone Definitions Continued

ePM Project Types

Milestone Name	Phase - Sub Phase	Definition
Issue Lease Amendment for Alterations	Execution - Post Award Activities	The Acquisition office officially issues lease amendment to lessor
CXa Award	Execution - Procurement	Commissioning Agent contract has been awarded.
Construction Start/NTP	Execution - Construction	The contractor is given authority to begin the construction of the project. Also applies to the beginning of a Design/Build contract.
Construction Peer Review 15%	Execution - Construction	Date of 15% construction peer review
Construction Peer Review 65%	Execution - Construction	Date of 65% construction peer review
Construction Peer Review 90%	Execution - Construction	Date of 90% construction peer review
Pre-Occupancy Tenant Access	Execution - Construction	GSA provides access to customers/tenant agencies for review of space/work completed prior to substantial completion and/or occupancy.
FFE Award/Order	Execution - Construction	Furniture, Fixtures and/or Equipment Contract Award or Order Placement
FFE Delivery	Execution - Construction	Furniture, Fixtures and/or Equipment Delivery
FFE Installation	Execution - Construction	Furniture, Fixtures and/or Equipment Installation
Substantial Completion	Execution - Construction	The project is approved for beneficial use or occupancy.
Construction Complete	Closeout	All construction work has been completed including all punchlist items.
Rent Start	Closeout	GSA has initiated rent for all impacted tenants.
Move Award	Closeout	Award of move contract
Move Start/NTP	Closeout	Start of move
Move Complete	Closeout	Move completion
Occupancy	Closeout	Tenants are formally occupying project affected space.
Project Closeout	Operations	Project is fully complete, Including completion of construction, financial closeout (e.g., RWA Closeout Letter with official deobligation amount), customer closeout, and system closeout.



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My Projects

Milestone Definitions for Lease Action Projects

Here are definitions of the milestones which apply to Lease Action projects - New Lease, Succeeding Lease, Superseding Lease, and New/Replacing Lease, in sequential order of an expected project timeline. *Note: schedule milestones are not always available for Lease Expansion and Lease Reduction projects.*

Milestone Name	Phase - Sub Phase	Definition
Customer Request	Identification	A customer agency has formally provided GSA notice of a need for space.
RWA Funds in Place for Prospectus Projects	Planning	Lump sum funding identified or required by formal Prospectus documentation has been formally transferred from the customer agency to GSA.
Requirements Finalized	Planning	The customer agency has provided GSA with comprehensive requirements documentation and specifications and no substantial revisions to the requirements are expected.
Acquisition Plan Finalized	Planning	The customer agency has reviewed the proposed lease contract and related documents and has communicated to GSA no further comments or concerns on the final version of the document package..
Initial Financial Assessment with Signed Customer Draft OA	Planning	A draft Occupancy Agreement based on estimated lease project costs has been signed by the customer agency and a project schedule has been developed.
Transmittal of Solicitation Package	Execution - Lease Procurement	GSA has distributed to interested parties in the private sector the proposed lease document and related paperwork for submitting an offer to lease space to the Government.
Receipt of Initial Offers	Execution - Lease Procurement	GSA's initial deadline for first offers from interested private sector space providers.
Signed OA Document for Award	Execution - Lease Procurement	The customer agency has signed an Occupancy Agreement based on actual negotiated rent costs and estimated build-out costs.
Lease Award	Execution - Lease Procurement	The Lease Contracting Officer has signed the Lease.
Design Intent Drawings Complete	Execution - Design	The Lessor's proposed layout for the project has been reviewed and accepted by the Government.
Customer review and acceptance of Construction Drawings	Execution - Design	The customer agency has had a chance to review, provide comments, and accept the final construction drawings for the space project.



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My Projects

Milestone Definitions

Continued

Lease Action Projects

Milestone Name	Phase - Sub Phase	Definition
TI Costs Approved and NTP Provided	Execution - Post-Award Activities	GSA has accepted the Lessor's final cost proposal for building out the leased space project.
Substantial Completion Acceptance of Space	Execution - Construction	GSA has concluded via visual inspection that construction is complete. Minor construction items that do not impact the ability of the customer agency to move in and operate may remain.
Punch List Complete	Closeout	All minor construction items identified at the time of substantial completion have been finished.
Lease Term Commencement	Operations	The contractual start date to the lease has been determined, usually coinciding with substantial completion or physical occupancy.

Milestone Definitions for RWA/RETA-only Projects

Here are definitions of the milestones which apply to RWA/RETA-only projects.

Milestone Name	Phase - Sub Phase	Definition
RWA Start	Initiation	Date RWA was accepted by GSA
Project Authorization/RWA Acceptance	Execution	Date the RWA project work is authorized to begin
Substantial Completion Date	Closeout	Date the RWA was marked substantially complete, meaning the project or service can be operated or occupied for its intended use, even if minor repairs or punch list items are still needed
Financial Closeout	Operations	Date the RWAs was financially closed out



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My Projects

Project Resource Links

Policy, Process and Training

Design and Construction Projects

- [Design and Construction Delivery Process](#)

GSA PBS Design and Construction website describes the process and expectations for your architecture and construction projects, including community planning, prospectus development, project authorization, and project management steps and deliverables. Relevant sub-pages include:

- [Space Assignment process and policy](#)
- [Construction Excellence program](#)
- [Design Excellent program and design library](#)
- [Accessible Facility Design](#)
- [Urban Development](#)

Commercial Lease Projects

- [GSA Leasing Desk Guide](#)

Contains authorities, policies, technical and procedural guides, and administrative limitations governing the acquisition by lease of real property. Download the searchable PDF or browse chapters such as source selection, lease construction, renewals and extensions, accessibility standards, parking acquisition, sustainability considerations, security, and lease file checklists.

- [GSA.gov/Leasing](#)

GSA.gov Leasing Website links to security standards for leased buildings, green lease policies, lease delegation information, lease inventory information, and publicly available lease documents.

- [Redacted Public Lease Documents](#)

New to Working with GSA

- [Real Estate for Federal Agencies Overview](#)

- [Pricing Desk Guide, 4th Edition](#) (Revised April 2014)
- [Finding Your National GSA Representative](#)
- [Using GSA Schedules](#)

Looking for Space

- [Inventory of Owned and Leased Properties](#)

Use the IOLP map tool to view data for GSA owned and leased properties. View specific information on each of GSA's properties such as: Vacant space, Physical location, Square footage, Lease expiration, and Congressional District



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My RWAs

RWAs Defined

Reimbursable Work Authorizations (RWAs) are established to capture and bill PBS customers the cost of altering, renovating, repairing, or providing services in space managed by GSA over and above the basic operations financed through Rent.

Note: RWAs can be standalone projects or can support projects as a funding source. The My RWAs view of the PBS Customer Dashboard shows all of your RWAs, regardless of whether they are stand-alone projects or in support of other non-RWA projects.

RWA Lifecycle

RWAs follow a standard lifecycle which is divided into five elements or phases:

1. **Requirements Development:** Customer identifies a need for work; customer notifies GSA; customer and GSA work together to develop a scope of work.
2. **Cost Estimation:** Customer/GSA estimate the cost to deliver the full scope of work.
3. **Receipt, Review, and Acceptance:** Customer sends GSA a fully-executable RWA to GSA; GSA sends a Receipt Letter to customer; GSA reviews and accepts or rejects the RWA.
4. **Execution:** GSA performs the work for the customer.
5. **Completion and Financial Closeout:** Upon substantial completion of the project, GSA sends the Completion Letter to the customer. Upon financial closeout of the project, GSA sends the Closeout Letter to the customer, at which point they may deobligate any remaining balance on the RWA.



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My RWAs

RWA Resource Links

Policy, Process and Training

Visit the national **RWA website** at www.gsa.gov/rwa for a wealth of RWA-related info, including:

RWA Overview

Overview information regarding RWAs, including a list of RWA Managers

Billing & Payment

RWA billing and payment information and resources for customers

Policy & Guidance

Featuring the National Policy Document for RWAs

Year-End Customer Letters

Training & FAQs

Featuring RWA Training Modules

Q&A on RWA Policy, Process, eRETA, RWA Types, Fees and Billing, and Estimates

Also visit the national **eRETA website** at www.gsa.gov/ereta to learn about the external RWA Entry and Tracking Application (eRETA), which allows customers to:

- Electronically submit new work requests
- Enter information directly into the system
- Make edits and create amendments to any RWAs associated with your Agency Bureau Code
- Upload documentation into eRETA to maintain an electronic 'RWA file'
- Search and download information for single or multiple RWAs; view related RWA estimates, backup documents, and financial data- how much has been spent, etc.



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My Occupancies

Occupancy Agreements Defined

The Occupancy Agreement (OA) is a complete, concise statement of the business terms governing the relationship between PBS and the tenant agency for a specific space assignment. The OA serves as the billing document on which subsequent Rent payments are based. Every space assignment in the PBS portfolio must have its own OA. Each assignment is recorded in the PBS inventory system.

The OA addresses both the financial specifics of the agreement (reflecting the underlying lease contract) and the responsibilities of PBS and the tenant agency. The OA is not a lease, nor is it a document detailing building rules and regulations. It is a formal agreement between the signing parties; PBS will honor its terms and expects the tenant agency to honor its terms as well.

The OA consists of four parts:

- Description of Space and Services
- Clauses (Terms and Conditions)
- Signature Page
- Financial Summary

The OA is developed and updated through successive iterations, beginning with initial preliminary budget estimates, continuing through space acquisition and development, and ending in the final, definitive billing OA. Thus, the OA serves as a preview of the tenant agency's total Rent charges. By revising and updating the preliminary OA as more information becomes available, PBS is sharing with the tenant agency how the business terms evolve throughout the space acquisition process.

The PBS Customer Dashboard only contains your occupancies in GSA-Managed (GSA-Owned or GSA Commercially Leased) space, and excludes any space managed, owned, or directly leased by your agency. The OAs and associated summary information in this dashboard are the most current final, billing versions.

Occupancy Agreement Lifecycle

All Occupancy Agreements with GSA follow a standard Lifecycle which begins with Operations as the default phase and transitions into Occupancy Planning phases within a predetermined number of months before the current operational OA expires.

Operations	Final OAs with more than 36 Months to Expiration
Planning- Strategic Requirements	30 Months to Expiration (Milestone #2 Strategic Requirements)
Planning- Technical Requirements	29 Months to Expiration (Milestone #4 Technical Requirements)
Execution	24 or less months to OA Expiration. Technical Requirements are finalized, the the follow on occupancy is in Project Execution.



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My Occupancies

RWA Resource Links

Policy, Process and Training

- [Pricing Desk Guide](#)
- [Managing Customer Requirements Fact Sheet](#)
 - Includes a list of deliverables by the customer during each Occupancy Planning phase
- [Occupancy Planning and Requirements Management Process: GSA PBS Customer Forum 2017](#)
 - Includes timelines for requirements submission (prospectus and non-prospectus), definitions of each planning phase, links to relevant OMB Directives, and an overview of the Client Project Agreement
- [Electronic Occupancy Agreement - eOA](#)
 - Search OAs within designated Agency Bureau codes
 - Select and run report(s) tabulating financial and clause information
 - See history of all rates that apply to the OA including USF, RSF and Parking
- [Inventory and Vacant Space in GSA-Owned and GSA-Leased buildings](#)



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My Rent

Billing and Rent Resources

Policy, Process and Training

[GSA Rent Overview Website](#)

- [Rent Bill Definitions](#)

[GSA Billing and Payment Website](#)

- [Paying Reimbursable Services through the Rent Bill](#)
- [RWA Overhead and 4% Fee Calculator](#)

[PBS Pricing Policy Website](#)

- [Pricing Desk Guide 4th Edition](#)
- [PBS Order 7025.1A - Rent Exemption Procedures](#)

[Exhibit 54 Resources](#) - Summary of all Rentable Square Footage, Base Rent Estimate and Anticipated Space Changes

- [Exhibit 54 Guidelines, Template, Contact List](#)
- [Exhibit 54: GSA IC Worksheet Video](#)

[Rent on the Web \(ROW\)](#) allows PBS customer agencies to view their monthly bills online

- [Rent on the Web FAQs](#)